



Checklist for Form HR-1040 (tax year 2003)

Bulletin HR-1

Introduction

This bulletin is designed to help you prepare your Homestead Rebate Application (Form HR-1040) and avoid the common mistakes that can change the amount of your expected rebate, delay the processing of your application, or even cause your rebate to be denied.

Begin by reading the instructions for the homestead rebate in the New Jersey Resident Income Tax Return booklet. Be sure that you meet the eligibility requirements. When you have completed the HR-1040 application, use the checklist below to be sure you have followed all the required instructions.

Have you ...

- ☐ Checked the mailing label for accuracy and placed it in the name and address box on Form HR-1040 (or printed the name, address, and County/Municipality Code in that area)?
- ☐ Entered your social security number (and spouse's, if applicable)?
- ☐ Filled in the appropriate filing status oval?
- ☐ Entered the dates you lived in New Jersey (part-year residents only)?
- ☐ Filled in *one* oval on Line 7 to indicate that at the end of the tax year you (and/or spouse) were (1) age 65 or over, or (2) blind or disabled, or (3) not 65 or blind or disabled?
- ☐ Enclosed documentation if this is the first time you (and/or spouse) indicated you were age 65 or over or blind or disabled?

- ☐ Entered on Line 8 the amount of income reported on Line 29 of the New Jersey income tax return (Form NJ-1040)? If you are not filing Form NJ-1040, have you entered the amount of income that would have been reported if Form NJ-1040 had been filed?
- ☐ Filled in the appropriate oval on Line 12 indicating whether you were a homeowner, tenant, or both?
- ☐ Answered questions 14a, 14b, 14c, and 14d (completed and enclosed Schedule HR-A if the answer was "yes" to any of these questions)?
- ☐ Signed and dated the application? (This is very important.)
- ☐ Made a photocopy of Form HR-1040 before mailing it?
- ☐ Mailed Form HR-1040 by the due date, or extended due date if filing under an extension? For most taxpayers, the due date for 2003, if not extended, is April 15, 2004. Qualified homeowners and tenants who do not have to file a New Jersey income tax return have until January 17, 2005, to file their 2003 HR-1040.

Homeowners

- ☐ Entered the block and lot numbers on Line 13?
- ☐ Entered the amount of property taxes that were due and paid from January 1, 2003, through December 31, 2003, on Line 15?

Tenants

- ☐ Entered the total amount of rent due and paid from January 1, 2003, through December 31, 2003, on Line 17?

For More Information

For more information on completing Form HR-1040, contact our Customer Service Center at 609-292-6400, e-mail us at taxation@tax.state.nj.us, or write to the Information and Publications Branch, PO Box 281, Trenton, NJ 08695-0281.